



## SENIOR & LONG TERM CARE DIVISION COMMUNITY SERVICES BUREAU

### COMMUNITY FIRST CHOICE Policy Manual

**Section: CFC/PAS Person Centered  
Planning**

**Subject: Person Centered Planning  
Annual Visits**

#### **PURPOSE:**

The purpose of the annual person-centered planning (PCP) visit is to review and the member's current PCP form (SLTC-200) and create a new form that is current to the member's situation.

#### **REQUIREMENTS:**

The CFC/PAS PCP form must be formally reevaluated by the Plan Facilitator to review the member's PCP form, specifically related to CFC/PAS services. The annual visit must include an updated evaluation of member goals, services, supports, schedule preferences, and back-up plan.

The intake section of the PCP form does not need to be marked during the annual visit.

#### **PROCEDURES:**

There are two procedures for completing an annual visit. One if the case manager is the Plan Facilitator and another if the provider is the Plan Facilitator

##### **1. If a case manager is the Plan Facilitator:**

- a. The annual PCP meeting should be done in conjunction with the annual visit requirements for case management.
- b. The annual PCP meeting should be done at a location determined appropriate through the requirements for case management.
- c. The annual PCP meeting must be coordinated with the CFC/PAS agency. Refer to CSB 1104 for information on coordinated visits.
- d. The Plan Facilitator is responsible for completing the new PCP form and ensuring proper signatures are obtained and distribution is made. The member, or the person authorized to sign on behalf of the member (as determined appropriate by the case manager), the CFC/PAS provider agency, and the Plan

		<b>CSB-1106</b>
<b>Section: CFC/PAS Person Centered Planning</b>	<b>Subject: Person Centered Planning Annual Visits</b>	

Facilitator must sign the form and receive a copy for their records.

- e. The CFC/PAS provider will complete a Recertification Form (SLTC-210) and update the CFC/PAS Service Plan (SLTC-170/175) at the annual visit.
- f. The Plan Facilitator must review and sign the CFC/PAS Service Plan that is developed at the annual visit.
- g. The CFC/PAS provider agency is responsible for ensuring compliance in service delivery within the parameters of the CFC/PAS program. If a concern about member or worker health and safety comes up as a part of delivery of the CFC/PAS Service Plan, then the CFC/PAS provider must complete a risk assessment using the Risk Negotiation form (SLTC-230). This form should be completed in collaboration with the member and Plan Facilitator.
- h. If general health and safety issues come up during the planning meeting it is the responsibility of the case manager to identify and address these issues through the case manager's risk assessment process. The Case Manager Plan Facilitator may work with the provider agency, as necessary, to resolve these issues.

## **2. If the CFC/PAS provider is the Plan Facilitator:**

- a. The annual PCP meeting should be done in conjunction with the annual visit requirements for the CFC/PAS provider.
- b. The annual PCP meeting must be done in the member's home unless approved by the RPO.
- c. The Plan Facilitator is responsible for completing the new PCP form and ensuring proper signatures are obtained and distribution is made. The member or personal representative, CFC/PAS provider agency, and Plan Facilitator must sign the form and retain a copy for their records. The review and update of the PCP form should include:
  - i. Conduct a face-to-face visit with the member to assess his/her current situation

		<b>CSB-1106</b>
<b>Section: CFC/PAS Person Centered Planning</b>	<b>Subject: Person Centered Planning Annual Visits</b>	

- ii. Re-evaluate the member's goals, supports, schedule preference, personal care attendant skills needed, and personal care attendant worker back—up plan and update and revise, if warranted
- d. The CFC/PAS provider will complete a Recertification Form and update the CFC/PAS Service Plan at the annual visit.
- e. The Plan Facilitator must review and sign the Service Plan that is developed at the annual visit.
- f. The CFC/PAS provider agency is responsible for ensuring compliance in service delivery within the parameters of the CFC/PAS program. If a concern about member or worker health and safety comes up as a part of delivering the CFC/PAS Service Plan then the provider agency must complete a risk assessment using the Risk Negotiation form (SLTC-230), if necessary.
- g. If health and safety issues come up related to the member's participation in the CFC/PAS program the Plan Facilitator is responsible for completing the Risk Negotiation form, if necessary.